Commonwealth of Kentucky

Kentucky Business One Stop Security Module

User Guide

Release 1.4
June 2015

Contents

1 Login

Security is an important consideration to Kentucky Business One Stop. You have entrusted One Stop with confidential information. The One Stop Security Module ensures that only authorized individuals may access that information.

When you access the Kentucky Business One Stop Portal, One Stop first asks you to log into the system. The "Login" page is the gateway to One Stop.

Note	User accounts created when registering a business before May 1, 2015 will <u>not</u> work with the current version of Kentucky Business One Stop.
	If you created a user account for One Stop after May 1, 2015, your user account will work.
	<u>Or</u>, if you already have a user account for the Withholding Return and Payment System (WRAPS) or the Occupations & Professions (O&P) application, your user account will work.

If you already have a user account, enter your Username and Password and click the 'Sign In' button. One Stop validates the information you entered and, if valid, displays the Kentucky Business One Stop "Dashboard."

If you do not have an account, click the link labeled 'Click here to create a user account.' See <u>Section 3: Create a User Account</u>.

If you are unable to log into One Stop, click the link labeled 'Trouble accessing your account?' See <u>Section 5: Trouble Accessing Your Account?</u>

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Note	One Stop adds the required prefix (cit\) to your Username when you tab out of the Username text box.

2 Common Features

2.1   Framework

The framework is consistent throughout One Stop.

The blue section across the top is the Governor's banner; this section is standard on the Commonwealth of Kentucky's official Web sites and offers links to Kentucky's and the Governor's official sites. The search functionality in this banner – when available – searches all Ky.gov Web pages.
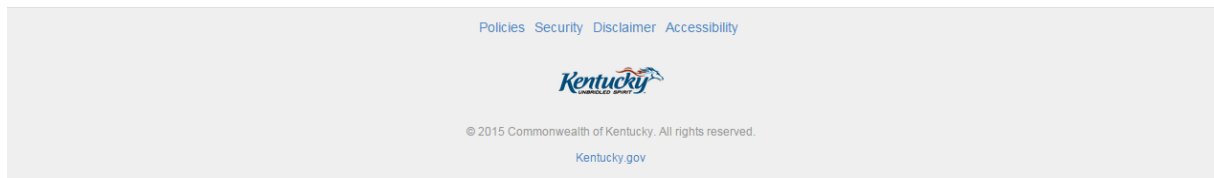
The light gray section across the bottom provides links to the Commonwealth's Privacy, Security, Disclaimer, and Accessibility policies and statements as well as displaying copyright information. This section is standard on the Commonwealth of Kentucky's official Web sites.

2.2   Security Module Banner

The gray section directly underneath the Governor's banner is the Security Module banner. When you are <u>not</u> logged into One Stop, the banner looks like this.
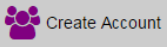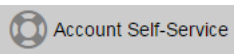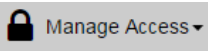
When you are logged into One Stop, the banner looks like this.

The following options are available in the banner, depending on whether you are logged in:

Icon	Function
	Takes you to the Kentucky One Stop Business Portal. If you are already logged into One Stop, it brings up the "Dashboard" (see the Kentucky Business One Stop User Guide available through the "Dashboard"); if not, it brings up the "Login" page (see Section 1).

	Takes you to the Security Module. If you are already logged into One Stop, it brings up the Security Module "Home" page (see Section 6); if not, it brings up the "Login" page (see Section 1).
Create Account	Displays only if you are not logged into One Stop. Brings up the "Create Account" page (see section 3).
Account Self-Service	Displays only if you are not logged into One Stop. Brings up the "Account Self-Service" page (see section 5).
Login	Displays only if you are not logged into One Stop. Brings up the "Login" page (see section 1).
Manage Access ▾	Displays only if you are logged into One Stop. The dropdown has an option to invite other individuals to access the information you manage (see section 6).
John Astor ▾	Displays only if you are logged into One Stop. The dropdown has options to access Account Settings (see section 4) to update your information, User Guide to see this user guide, and Logout to exit the portal.

2.3 Helpful Tips

Many pages contain helpful tips for what you can do on that page.

Helpful Tips ℹ

You may not change the email address associated with your account to a previously used email address. Once you confirm an email address, it is forever associated with your account and cannot be re-used.

When you click in a text box or dropdown, a tip often pops up to explain what kind of information One Stop expects you to enter.

Email Address

The email address to associate with your user account.

2.4 Quick Links

The Quick Links section appears on almost every page, offering quick navigation back to the system you were using previously.

Quick Links

Kentucky Business One Stop (KyBOS)

Occupations & Professions (O&P)

Withholding Return and Payment System (WRAPS)

If you already are logged into One Stop, the links take you to the system's "Home" page. If not, the links take you to the "Login" page.

2.5   Legal Disclaimer

The Legal Disclaimer appears on all Security Module pages.

Legal Disclaimer

This website is the property of the Commonwealth of Kentucky. This is to notify you that you are only authorized to use this site, or any information accessed through this site, for its intended purpose. Unauthorized access or disclosure of personal and confidential information may be punishable by fines under state and federal law. Unauthorized access to this website or access in excess of your authorization may also be criminally punishable. The Commonwealth of Kentucky follows applicable federal and state guidelines to protect the information from misuse or unauthorized access.

2.6   Captcha

The One Stop Security Module uses a CAPTCHA (**C**ompletely **A**utomated **P**ublic **T**uring test to tell **C**omputers and **H**umans **A**part) to verify that you are a person using the application.

2.6.1   Text entry

The default Captcha layout asks you to type the text you see. Enter the characters and the word with a space between them.

When characters are difficult to read, you may use the refresh button to display another set of characters or use the audio button to switch to audio.

2.6.2   Audio Entry
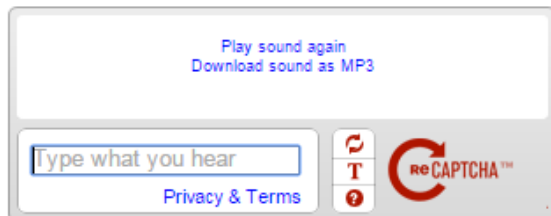
The audio entry layout asks you to type the text you hear. You may increase the volume as needed to understand the spoken numbers/characters. You may use the text button to switch back to text.

3 Create a User Account

If you have not yet created a user account for WRAPS, O&P, or One Stop, click the link labeled 'Click here to create a user account' on the "Login" page.

3.1   Create Account

The "Create Account" page appears.

Create Account

Username*

Display Name*

First Name*

Last Name*
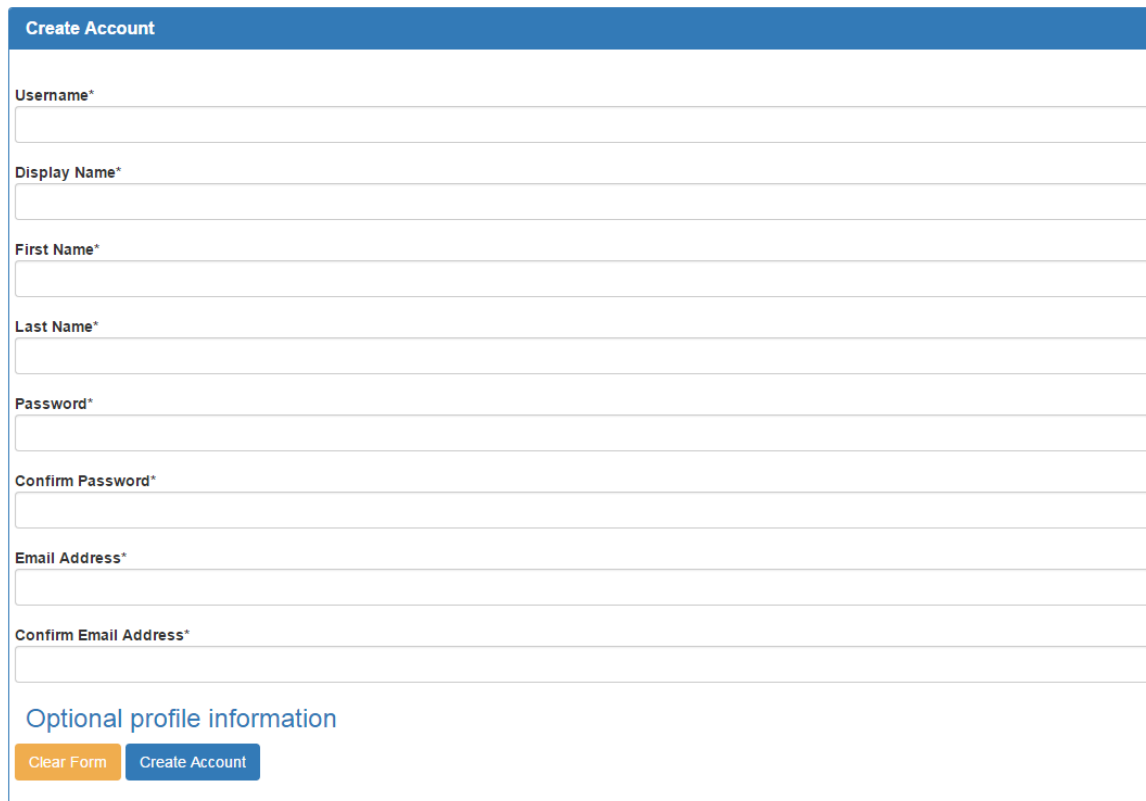
Password*

Confirm Password*

Email Address*

Confirm Email Address*

Optional profile information

[Clear Form] [Create Account]

Enter the following information:

- Username (that is, the login name you want to use for One Stop)
- Display Name (that is, the name – or nickname – you want One Stop to use when addressing you)
- First Name and Last Name
- Password and Confirm Password – these must match and meet the criteria for passwords shown under Helpful Tips on the right.
- Email and Confirm Email address – these must match

The 'Optional profile information' link expands the page for entry of other personal information: prefix (e.g., Mr., Ms.), your middle name, suffix (e.g., Jr., II), street address or

PO Box Number, zip code, city, county, state, and country. If you decide not to enter this information, click the 'Optional profile information' link again to hide the display.

After entering the information for your user account, click 'Create Account' to proceed. (The 'Clear Form' button erases the information you entered so that you may start fresh.)

3.2   Thank you for registering

After you click 'Create Account,' the "Thank you" page appears.

You are done with creating your user account – for the moment.

Please monitor your email (for the email address you entered on the "Create Account" page) for a confirmation message from One Stop. This message is a prerequisite for completing the creation of your user account.

3.3   Email Confirmation

Within a few minutes, One Stop will send a confirmation to the email account you provided.

Click the link in the email labeled 'Click here to activate your account.' When the Kentucky Business One Stop "Login" page appears, your account has been activated. You may immediately log into One Stop with the Username and password you created.

If the link does not work, copy the address below it into your browser's address bar and press 'Enter.'
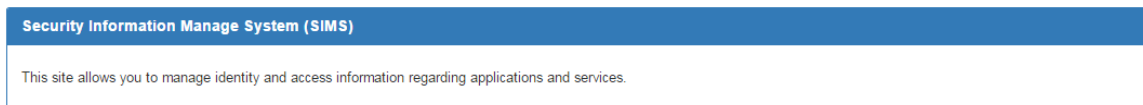
4 Update Your Profile

After logging into Kentucky Business One Stop (through Occupations & Professions, the Withholding Return and Payment System, or Enterprise Registration Services), you may access your profile by typing 'sims.cot.ky.gov' after 'https://' in your browser URL. In future releases of these systems, the Commonwealth will provide an 'Account Settings' link underneath your user name.

If you already are logged into the One Stop Security Module, click the Security icon.

4.1   Security Module Home Page

The Security Module "Home" page appears.

Security Information Manage System (SIMS)

This site allows you to manage identity and access information regarding applications and services.

The "Home" page currently does not have any functionality other than providing access to update your profile.

Click on your name in the upper right corner, directly underneath the Governor's name and picture. Select 'Account Settings' in the dropdown menu. The "Change Name/Address" page appears. This is the default page when you first choose to access Account Settings.

Click the appropriate link on the left to update your information.

Link	Function
Change Name/Address	Change your name, address, prefix and/or suffix.
Change Email	Change the email address associated with your user account. The email address is critical information; One Stop may use your email address to verify who you are and to alert you of changes to your user information.
Change Password	Change your password.

4.2   Change Name/Address

When you select the 'Change Name/Address' link, the "Change Name/Address" page appears.

Change Name/Address

Prefix

Mr

First Name*

John

Middle Name

Jacob

Last Name*

Astor

Suffix

Esq

Address 1

350 5th Ave

Address 2

Suite 2600

PO Box Number

Zip Code

10118

City

New York

County

State

New York ▾

Country

United States ▾

[Clear Form] [Change Name/Address]

Update the following information as desired: prefix (e.g., Mr., Ms.), first name, middle name, last name, suffix (e.g., Jr., II), street address or PO Box Number, zip code, city, county, state, and country. First Name and Last Name are the only fields required.

After updating the information, click 'Change Name/Address' to save the information. (The 'Clear Form' button resets the information to what One Stop has on file so that you may start fresh.)

4.3   Change Email

When you select the 'Change Email' link, the "Change Email" page appears.

Note | You may not change the email address associated with your account to a previously used email address. Once you confirm an email address, it is forever associated with your account and cannot be re-used.

Enter your current email address as well as your new email address. The Confirm Email Address must match your new email address.

After updating the information, click 'Change Email' to save the information. (The 'Clear Form' button resets the information to what One Stop has on file so that you may start fresh.)

4.3.1   Confirm Email Address

When you click 'Change Email,' One Stop displays the "Confirm Email Address" page.

Within a few minutes, One Stop will send an email confirmation to the new email account you provided. You may immediately use the security code in bold print in the email to confirm that you changed your email address.

If you exited the Security Module before receiving the email, you may click the link in the email to return to the "Confirm Email Address" page.

Confirm Email Address

Your request to change the email associated with your user account has been submitted. In a few minutes, you should recieve an email to the new address you provided. Please follow the instructions within that email to finalize the change.
NOTE:Until you confirm your email, your previously registered email will still receive any notifications from our systems.

Email Address

Security Code*

Clear Form   Confirm Email Address

Enter the security code and click 'Confirm Email Address.' One Stop will update the email address associated with your account.

Note   The security code is valid for 8 hours. If you do not use it within that timeframe, you will have to request another code.

4.4   Change Password

When you click 'Change Password,' One Stop displays the "Change Password" page.

Change Password

Current Password*

New Password*

Confirm Password*

Clear Form   Change Password

Enter your current password, then enter the new and confirm passwords. Password and Confirm Password must match and meet the criteria for passwords shown under Helpful Tips on the right. Click 'Change Password' to make the change.
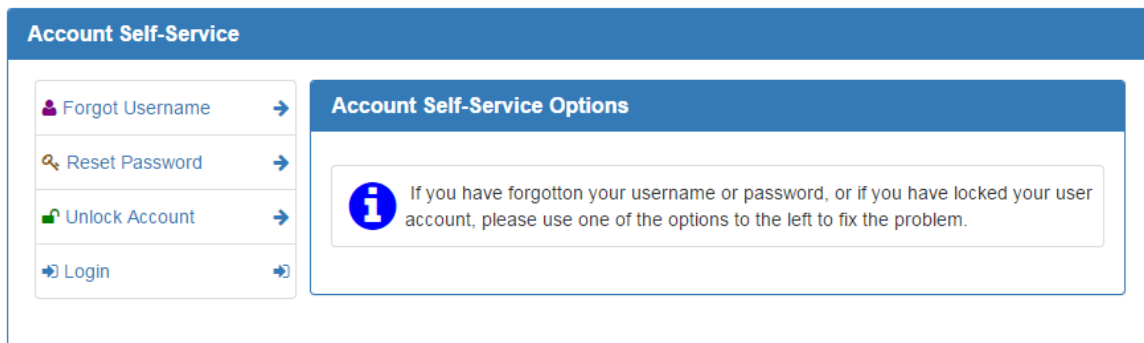
5 Trouble Accessing Your Account?

If you are unable to log into Kentucky One Stop, click the link labeled 'Trouble accessing your account?' on the "Login" page.

The One Stop Security Module allows you to resolve access issues through your email. Email address is required when you create your account.

5.1 Account Self-Service

When you click 'Trouble accessing your account?' on the "Login" page, the "Account Self-Service" page appears.

Click the appropriate link on the left to resolve the access problem you are having.

5.2 Forgot Username

When you select the 'Forgot Username' link, the "Forgot Username" page appears.

Select 'My Email' in the 'Send Username To' dropdown. When you select email, the page expands to allow entry of your email address.

Enter your email address, then type the text you see in the Captcha. Click 'Retrieve Username' to request that One Stop send you your username. (The 'Clear Form' button clears information that you have entered thus far.)

After One Stop verifies that that the email address is registered, One Stop displays a message that your Username has been sent as directed. If One Stop cannot find the email address in the system, One Stop displays an appropriate error message.

Check your email for a message containing your Username. You may immediately use this Username to log into Kentucky Business One Stop.

5.3   Reset Password

When you select the 'Reset Password' link, the "Password Reset: Request Security Code" page appears.

Account Self-Service

- 👤 Forgot Username →
- 🔑 Reset Password →
- 🔓 Unlock Account →
- ➡ Login →

Password Reset : Request Security Code

Username

Send Code To*

Select Option...

Captcha

iseOKz nothing

Type the text

Privacy & Terms

reCAPTCHA™

Clear Form   Request Security Code   Already Have A Code? Click

Enter your Username and select 'My Email' in the 'Send Code To' dropdown. When you select email, the page expands to allow entry of your email address.

Enter your email address, then type the text you see in the Captcha. Click 'Request Security Code' to request that One Stop send you a security code to reset your password. (The 'Clear Form' button clears information that you have entered thus far. The 'Already Have A Code? Click' button brings up the code entry page. This is useful if you exited the system while waiting for delivery of the security code.)

After One Stop verifies that that the email address matches the Username entered, One Stop displays a message that a security code has been sent as directed. If One Stop cannot match the email address with the Username, One Stop displays the same message but does not send a security code. This protects your information from potential hackers.

Check your email for a message containing a security code. You may immediately use the security code to reset your password in Kentucky Business One Stop.

Enter your Username, the Security Code sent to you (via email or text), New Password, Confirm Password, and Captcha.

Enter your new password twice. These must match and meet the criteria for a secure password:

- o Be between 8 and 15 characters long.
- o Contain at least one number and one letter.
- o Contain at least one special character.
- o Contain at least one capital letter.

Click 'Reset Password' to request that One Stop change your password as directed. (The 'Clear Form' button clears information that you have entered thus far.)

After One Stop verifies that that the Security Code is valid for the Username and that the two passwords match, One Stop displays a message that your password has been reset. If there is an error, One Stop displays an appropriate error message for you to correct the error and try again.

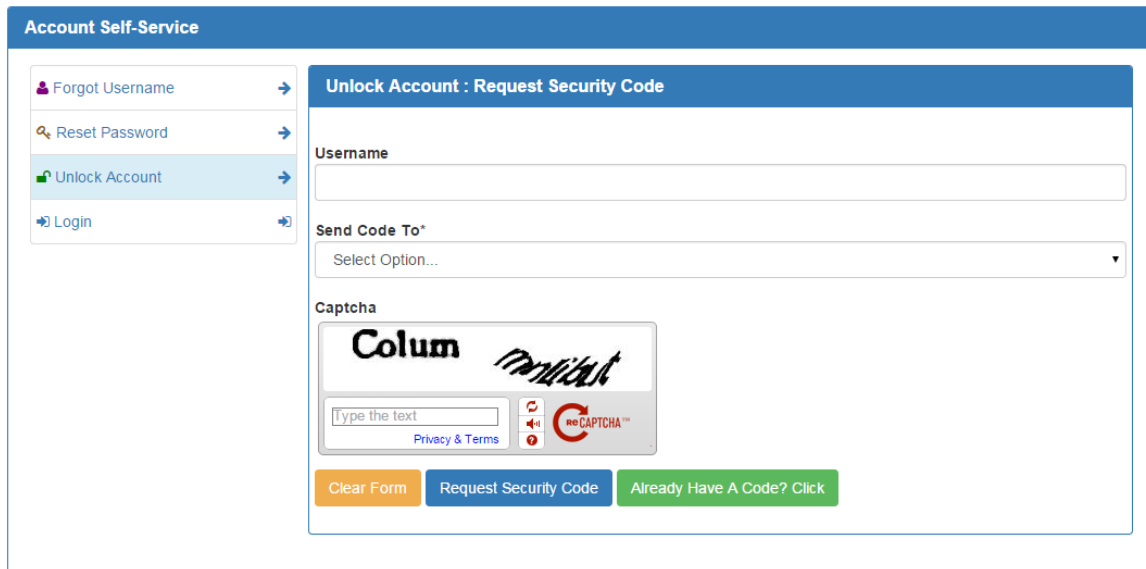**Note** The security code is valid for 8 hours. If you do not use it within that timeframe, you will have to request another code.

You may immediately use this new password to log into Kentucky Business One Stop.

After you reset your password, One Stop sends another email to the email address for your account. This security measure makes you aware that your password has been reset and informs you whom to contact if you did not reset it.

5.4   Unlock Account

When you select the 'Unlock Account' link, the "Unlock Account: Request Security Code" page appears.

Enter your Username and select 'My Email' in the 'Send Code To' dropdown. When you select email, the page expands to allow entry of your email address.

Enter your email address, then type the text you see in the Captcha. Click 'Request Security Code' to request that One Stop send you a security code to reset your password. (The 'Clear Form' button clears information that you have entered thus far. The 'Already Have A Code? Click' button brings up the code entry page. This is useful if you exited the system while waiting for delivery of the security code.)

After One Stop verifies that that the email address matches the Username entered, One Stop displays a message that a security code has been sent as directed. If One Stop cannot match the email address with the Username, One Stop displays the same message but does not send a security code. This protects your information from potential hackers.

Check your email for a message containing a security code. You may immediately use the security code to unlock your user account in Kentucky Business One Stop.

Enter your Username, the Security Code sent to you (via email or text), and the Captcha.

Click 'Unlock Account' to request that One Stop unlock your user account. (The 'Clear Form' button clears information that you have entered thus far.)

After One Stop verifies that that the Security Code is valid for the Username, One Stop displays a message that your account has been unlocked. If there is an error, One Stop displays an appropriate error message for you to correct the error and try again.

Note | The security code is valid for 8 hours. If you do not use it within that timeframe, you will have to request another code.

You may immediately log into Kentucky Business One Stop with your Username and password.

5.5   Login

When you select the 'Login' link, the "Kentucky Business One Stop Login" page appears. See Section 1: Login.
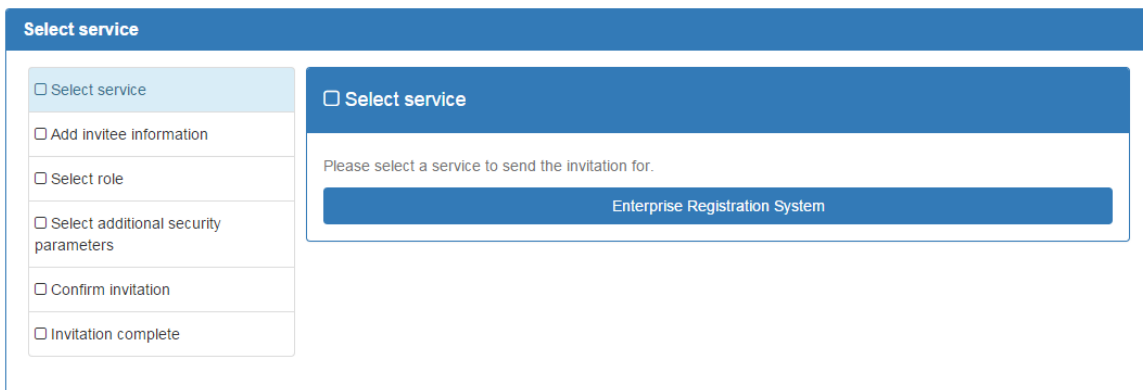
6 Manage Access

If you are the Business One Stop Administrator, you may grant access to business information through the 'Manage Access' icon on the KyBOS "Dashboard." In future, you also will be able to revoke access.

6.1 Granting Access

6.1.1 Select service

When you select the 'Manage Access' icon on the One Stop "Dashboard," the "Select Service" page appears.

This page allows you to select a service. For the initial roll-out of ERS, Enterprise Registration System is the only option.

Click the 'Enterprise Registration System' button.

6.1.2 Add invitee information

The "Add invitee information" page appears, showing on the left that you have completed the first step in the granting access process.

Supply information about the individual to whom you want to grant access. Enter the individual's email address, first name and last name. All three fields are required. If you enter an email for an existing user account, the Security Module will pre-populate the first name and last name. You may personalize the names if desired.

Note: The 'Cancel Invitation' button returns you to the "Dashboard."

Click the 'Continue' button to proceed to the next step.

6.1.3   Select role

The "Select role" page appears, showing on the left that you have completed the first two steps in the granting access process.

This page displays the roles for which you may grant access and allows you to select a role in the dropdown.

For the initial roll-out of ERS, the <u>only</u> options included in the dropdown are as follows:

Role	Authorization
Registration Administrator	The Registration Administrator role has authority to manage all aspects of the business, including tax account information; however, the Registration Administrator may not grant or revoke access to other individuals.

Role	Authorization
One Stop Business Administrator	The One Stop Business Administrator role has authority to manage access for a business; he/she may not view or update other business information and will not see the business in the 'My Available Businesses' grid on the "Dashboard."
Tax Type Tax Account Viewer where *Tax Type* = the name of the tax, for example, Consumer's Use, Sales and Use.	The *Tax Type* Tax Account Viewer role has authority to view information only for the specific tax type and tax account.

Note: The 'Cancel Invitation' button returns you to the "Dashboard."

After selecting the role, click the 'Continue' button to proceed to the next step.

6.1.4   Select additional security parameters

The "Select additional security parameters" page appears, showing on the left that you have completed the first three steps in the granting access process.

This page varies depending on the role you selected.

6.1.4.1 One Stop Business Administrator or Registration Administrator

For assigning the One Stop Business Administrator and Registration Administrator roles, the list of options includes only businesses for which you are the One Stop Business Administrator. The display (as shown above) shows the role selected and includes the Business Name and the business' Commonwealth Business Identifier (CBI).

6.1.4.2 Tax Type Viewer

For assigning any *Tax Type* Tax Account Viewer role, the list of options includes only tax accounts of the selected *Tax Type* for which you are the One Stop Business Administrator. The display includes the Business Name, the business' Commonwealth Business Identifier (CBI), and the account number for the tax type.
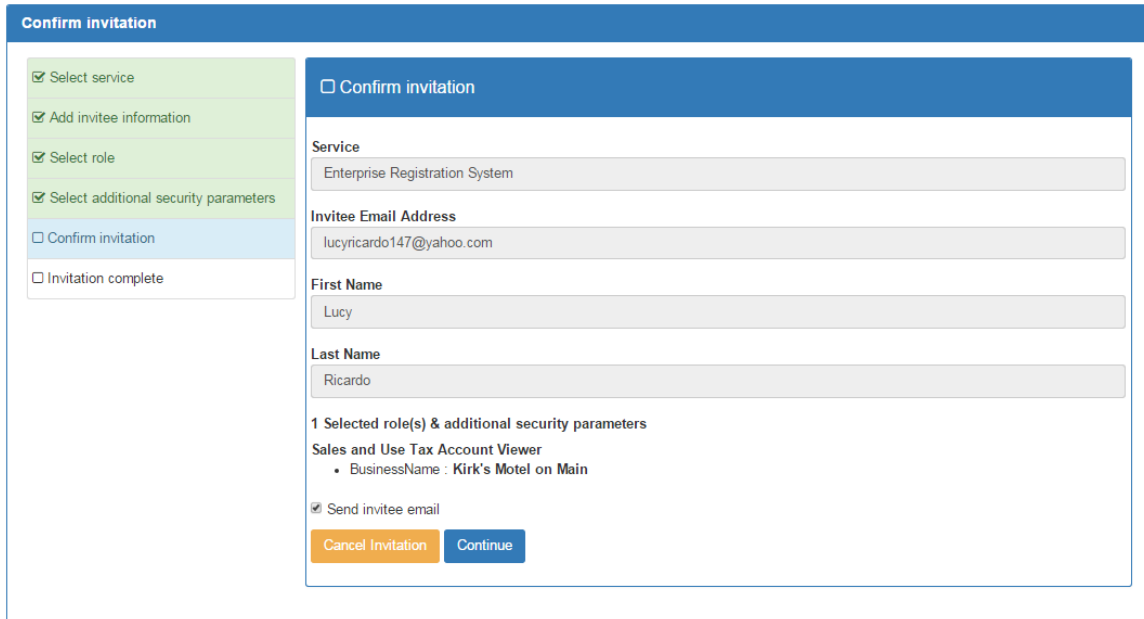
Notes:

- The 'Cancel Invitation' button returns you to the "Dashboard."
- The 'Change Role' button returns you to the "Select Role" page. The Security Module warns you that you may lose any selections if you change the role. If you do not want to lose your current selections, use the 'Add Another' button.
- The 'Add Another' button saves your current selections, and returns to the "Select Role" page for you to select another role. This allows you to grant any number of roles to an individual in one session.

Check all businesses or tax account numbers to which you want to give the invitee access.

After making your selections, click the 'Continue' button to proceed to the next step.

6.1.5 Confirm the invitation

The "Confirm the invitation" page appears, showing on the left that you have completed the first four steps in the granting access process.

This page displays the information gathered thus far, allowing you to confirm your selections before finalizing them. The page shows the service (always ERS for the initial rollout), the invitee's email address, first name and last name, and the roles assigned.

- For the One Stop Business Administrator and Registration Administrator roles, the list will identify the business or businesses (name and CBI) for which the role was granted.

- For each *Tax Type* Tax Account Viewer role, the list will identify the business (name and CBI) and tax accounts (tax type and account number) for which the role was granted.

The Send Invitee Email checkbox allows you to choose whether to send an email to the invitee. The checkbox defaults to "checked."

Note: The 'Cancel Invitation' button returns you to the "Dashboard."

Verify the information and click 'Continue' to complete the process.

6.1.6   Invitation complete

When you click the 'Continue' button, the "Invitation Complete" page appears, showing on the left that you have completed all steps.

The Security Module has assigned the role(s) to the individual you entered and sent an invitation via email.

You may choose from the following two options:

• The 'Return To Your System' button returns you to the "Dashboard."

• The 'Invite Another User' button displays the "Select Service" page for you to grant access to another individual.

6.2   Invitation Email

If you are <u>not</u> the individual who registered the business, the Business One Stop Administrator must grant you access before you can view any information about the business. When the Business One Stop Administrator grants you access, One Stop sends you an email invitation listing the roles and businesses that the One Stop Business Administrator assigned to you.

If you do <u>not</u> already have a user account with One Stop, you have 30 days to create one. After 30 days, the invitation expires.

Once you have a user account with One Stop:

• If you have been granted any role other than One Stop Business Administrator, the business will now appear in your list of 'My Available Businesses.'

• If you have been granted <u>only</u> the role of One Stop Business Administrator, you will not see the business in your list of 'My Available Businesses' but you will have the ability to grant access to other individuals through the 'Manage Access' icon.